

(1) Fourteenth and Final Account and Report of Conservator; (2) Petition for Fees, for Termination of Conservatorship Distribution of Assets of Estate and (3) Discharge of Conservator (Prob. C. 1860 & 2620)

DOD: 11-10-10		<b>CALIFORNIA DEPT. OF DEVELOPMENTAL SERVICES</b> , Conservator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
				<u>Note: This is the 7<sup>th</sup> hearing on this final account.</u>	
				Minute Order 5-17-12: Attorney Bruce Beland is appearing via conference call. Matter continued to 6-28-12.	
Cont. from 111711, 020212, 040512, 051712, 062812, 080212		Account period: 3-1-09 through 11-10-10		Minute Order 6-28-12: No appearances. The Court sets the matter for OSC Re Sanctions (Page 1B). The Court orders Cynthia Bosco and/or a person from her department to be personally present on 8-2-12.	
	Aff.Sub.Wit.		Accounting: \$34,377.72	On 7-20-12, Attorney Bruce Beland, Senior Staff Counsel for Dept. of Developmental Services Office of Legal Affairs, filed a declaration. The declaration states the Dept. was served with the OSC on 7-11-12, apparently based on the Court's belief that the Dept. had not filed its account. However, the account was filed and set for hearing on 11-17-11.	
✓	Verified		Beginning POH: \$14,465.02	Minute Order 8-2-12: The court informed Mr. Beland that the lien has to be satisfied before distribution of assets. Documents to resolve issues and go further in this case need to be filed by 9/20/12. Examiner notes provided. Continued to 10/4/12.	
	Inventory		Ending POH: \$16,100.50	As of 10-1-12, nothing further has been filed. The following issues remain:	
	PTC		Account period: 11-11-10 through 6-30-11	1. Probate Code §§ 2631 and 13100 allow liquidation and distribution of <u>personal property only</u> in the manner requested. Real property, including undivided interests, is subject to Probate Code §13151, which requires the mandatory judicial council Petition to Determine Succession to Real Property Form DE-310, inventory and appraisal as of the date of death, and noticed hearing.	
	Not.Cred.		Accounting: \$18,405.01	2. Petitioner also requests to distribute this asset when there is a Medi-Cal lien on the estate. Need authority.	
✓	Notice of Hrg		Beginning POH: \$16,100.50	3. Need Order.	
✓	Aff.Mail	W	Ending POH: \$12,537.04	Reviewed by: skc	
	Aff.Pub.		(POH consists of cash in the amount of \$554.93 plus an undivided 1/3 interest of a 3/4 interest in real property, a stove, and an air conditioner)	Reviewed on: 10-1-12	
	Sp.Ntc.		Conservator: \$125.00	Updates:	
	Pers.Serv.		Attorney: \$40.00	Recommendation:	
	Conf. Screen		Petitioner states there is a Medi-Cal claim in the amount of \$108,627.87 and requests that the court authorize payment of the remaining balance of the conservatorship estate on this claim.	File 1 - Tortorella	
	Letters		<b>Petitioner prays for an Order:</b>		
	Duties/Supp		1. Approving, allowing and settling the final account;		
	Objections		2. Terminating the proceedings herein;		
	Video Receipt		3. Authorizing payment of the conservator's and attorney's fees;		
✓	CI Report		4. Authorizing payment of the remaining balance to the Dept. of Health Services as payment in full on the Medi-Cal claim;		
	9202		5. Authorizing transfer of the house, stove and air conditioner to the Conservatee's sister; and		
✓	Order		6. Discharge of Conservator.		
	Aff. Posting				
	Status Rpt	X			
	UCCJEA				
	Citation				
	FTB Notice				

**Probate Status Hearing Re: Termination of Proceeding for Deceased Conservatee  
(Prob. C. § 1860, et seq)**

<b>DOD: 11-6-09</b>		<b>DEPARTMENT OF DEVELOPMENTAL SERVICES</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		is Conservator.	
		Conservatee died on 11/6/09.	
<b>Cont. from 051712, 062812, 080212</b>		The Thirteenth Account was approved on 6/16/09 showing a property on hand balance of <b>\$14,193.12, including an interest in real property.</b>	<b><u>OFF CALENDAR</u></b>
<b>Aff.Sub.Wit.</b>		The Court set status hearing for termination of proceedings for deceased Conservatee on 10-12-11.	<b>14<sup>TH</sup> and Final Account filed 9-19-12 is set for hearing on 11-1-12.</b>
<b>Verified</b>		The matter was continued to 11-16-11 and 2-8-12; however, the 2-8-12 hearing was taken off calendar and rescheduled for 5-17-12.	<u>The following issue remains:</u>
<b>Inventory</b>		On 5-17-12, Attorney Beland appeared via conference call and the matter was continued to 6-28-12.	<b>1. The Reply and Petition to Terminate filed 7-23-12 is not verified by the fiduciary pursuant to Probate Code §§ 1021, 1023 and does not constitute a final account pursuant to Probate Code §§ 2620(b), 2630.</b>
<b>PTC</b>		On 6-28-12, there were no appearances. The Court set the matter for OSC Re sanctions and sent notice to Conservator. Minute Order 6-28-12 states: The Court orders Cynthia Bosco and/or a person from her department to be personally present on 8-2-12.	<b>Need petition to terminate proceedings for deceased Conservatee pursuant to Probate Code §§ 2620(b), 2630.</b>
<b>Not.Cred.</b>		On 7-23-12, the Conservator filed Reply to OSC and Petition to Terminate the Conservatorship that states that the limited Conservatee passed away 11-6-09 and conservatorship is no longer required. Conservator requests that the court dismiss the OSC and terminate the conservatorship.	<b>(POH at the close of the 13<sup>th</sup> account was \$14,193.12, which included an interest in real property, similar to that of the related case. Examiner notes that in the related case there was a Medi-Cal lien. Because a final account has not been filed in this case, it is unknown if there is a lien, but likely.)</b>
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	X		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

**Probate Status Hearing Re: Filing Final Distribution**

<b>DOD: 7/27/2006</b>		<p><b>ANN SHINAVER</b>, daughter, was appointed Executor with Full IAEA without bond on <b>11/14/2006</b>. Letters issued on <u>11/15/2006</u>.</p> <p><b>Final Inventory and Appraisal was filed on 12/14/2011</b> showing an estate value of <b>\$39,400.27</b> consisting of real and personal property.</p> <p><b>First account or petition for final distribution was due 3/15/2008.</b></p> <p>Minute order from 8/6/12 set this status hearing. Attorney Walter Scott appeared via Court Call.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need petition for final distribution, first account or current status report. (<b>Note:</b> A Final Report of Personal Representative was returned to Attorney Scott unfiled because a filing fee of \$435.00 was not included.)</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 10/1/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 - Davies</b></p>	

**(1) Fourth Account Current and Report of Trustee and Petition for Its Settlement  
and (2) for Allowance of Fees to Attorney (PC 2620. 26441)**

		<b>THELDA MAE DODD</b> , Trustee, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 7/1/10 – 6/30/12	
<b>Cont. from</b>		Accounting - <b>\$54,936.94</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$49,308.03</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$52,936.94</b>	
<input type="checkbox"/>	<b>Inventory</b>	Trustee - <b>not addressed</b>	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Attorney - <b>\$2,000.00</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	(per Local Rule)	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620(c)</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		

**Petitioner prays for an Order:**

1. Approving, allowing and settling the fourth account.
2. Authorizing the attorney fees

**Note:** If the petition is granted, a status hearing will be set as follows:

- **Friday, September 5, 2014** at 9:00 a.m. in Department 303, for the filing of the fifth account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

<b>Reviewed by: KT</b>
<b>Reviewed on: 10/2/12</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 4 - Dodd</b>

**5 Tarek K. Alameldin (Estate)**  
**Atty Rindlisbacher, Curtis D. (for Naglaa K. Alameldin – Sister – Administrator)**  
**Atty Shahbazian, Steven L. (for Roli Elsotari)**

**Case No. 06CEPR01226**

**Probate Status Hearing Re: Filing Account**

<b>DOD: 11/06/06</b>		<p><b>NAGLAA K. ALAMELDIN</b>, sister, was appointed Administrator with full IAEA and bond of \$190,000.00 on 01/02/07.</p> <p><b>NAGLAA K. ALAMELDIN</b> filed a <b>Status Report of Administration of Estate and Petition to Approve First Account</b> on 09/21/10.</p> <p>The <b>Petition to Approve First Account</b> was continued several times (11 hearings total) and the Court denied the Petition with leave to Amend on 06/04/12.</p> <p><b>Minute Order from hearing on 8/6/12</b> set this matter for status regarding filing the account.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Final Account and Petition for Final Distribution or current status report.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 10/1/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5 - Alameldin</b></p>	

**Probate Status Hearing Re: Filing of First Account or Petition for Final Distribution  
(Prob. C. 12200, et seq)**

[illegible]

## (1) First Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney (Prob. C. 2620, 2623,, 2942)

<b>Age:</b> 91	<b>PUBLIC GUARDIAN</b> , Conservator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: <b>01/10/11 – 06/30/12</b>	<b>Note:</b> The Conservator states: the assigned Deputy spent several hours arranging placement of the conservatee and finding suitable caregivers due to her behavior issues. Further, the conservatee has several parcels of real property that are held in Trust. Upon appointment as Conservator, the office of trustee of the Trust was vacant. There were security issues regarding the real property, so the Public Guardian secured the assets to prevent loss. The properties include real property in Fish Camp, which the Deputy traveled to. Bruce Bickel was appointed as successor trustee of the Trust and requested the Public Guardian staff assist him in handling the properties. This entailed packing a lifetime's accumulation of belongings and collectibles that filled a 1,600 sq. ft. house and 900 sq. ft. apartment and a 2 car garage. Public Guardian staff also assisted Mr. Bickel with repairs to rental homes of the conservatee and performed numerous other activities providing for the conservatee's basic needs, marshaling and protecting assets of the estate.
<b>Cont. from</b>	Accounting - <b>\$198,822.11</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$131,541.53</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$76,123.75</b>	
<input type="checkbox"/> <b>Inventory</b>	Conservator - <b>\$34,018.16</b> (235.59	
<input type="checkbox"/> <b>PTC</b>	Deputy hours @ \$96/hr. and 150.02 staff hours @ \$76/hr. – See Note)	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney - <b>\$2,500.00</b> (per	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	Local Rule)	
<input type="checkbox"/> <b>Aff.Pub.</b>	Bond Fee - <b>\$360.26</b> (ok)	
<input type="checkbox"/> <b>Sp.Ntc.</b>	Costs - <b>\$547.00</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	(processing fee for certification of Letters of Conservatorship)	
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/> <b>Letters</b>	1. Approving, allowing and settling the first account;	
<input type="checkbox"/> <b>Duties/Supp</b>	2. Authorizing the conservator and attorney fees and commissions; and	
<input type="checkbox"/> <b>Objections</b>	3. Authorizing payment of the bond fee and costs.	
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> JF
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on:</b> 10/02/12
<input type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 7 - Johnson</b>

**(1) First and Final Account and Report of Executor and Petition for Its Settlement,  
and (2) Petition for Final Distribution, (3) for Allowance of Compensation to  
Executor and Ordinary and Extraordinary Compensation to Attorneys**

<b>DOD: 7/24/2011</b>		<b>JOAN STEELE</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 7/24/11 – 6/30/12	
		Accounting - <b>\$423,436.07</b>	1. Need blocking orders for monies to be deposited into block account for minors, Colton Steele and Vijay Stevens.  <b>Note:</b> If the petition is granted, status hearings will be set for the filing as follows:  • <b>Friday, November 5, 2012</b> at 9:00 a.m. in Department 303, for the filing of the receipts for blocked accounts.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
		Beginning POH - <b>\$421,047.48</b>	
		Ending POH - <b>\$409,823.80</b>	
<b>Cont. from</b>		Executor (statutory) - <b>\$11,378.21</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Attorney (statutory) - <b>\$11,378.21</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Attorney x/o - <b>\$5,723.00</b> (19.4 hours @ \$295/hr for Petition to Determine Entitlement and Petitions to Appoint Guardian Ad Litem.	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Costs - <b>\$2,591.21</b> (filing fees, publication, probate referee, postage and copies for more than 10 persons).	
<input checked="" type="checkbox"/>	<b>PTC</b>	Closing - <b>\$5,000.00</b>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	<b>Distribution, pursuant to Decedent's Will and Order Determining Entitlement is to:</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Pastor Ray Krinkel - <b>\$23,360.13;</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Barbra Gade, Claire Mayer, Ed Mayer, Ted Steele, Richard Steele, Jr., Wesley Hamilton, Donna Tejada, Thelma Luna Balanay and Martha Ramirez - <b>\$15,573.87</b> each;	
	<b>W/</b>	Kevin Gunther, Gary Gunther and Robert Gunther - <b>\$5,191.29</b> each;	
	<b>Aff.Pub.</b>	Lyle Gade - <b>\$31,142.39</b>	
	<b>Sp.Ntc.</b>	Joan Steele - <b>\$116,800.68</b>	
	<b>Pers.Serv.</b>	St. Johns Evangelical Lutheran Church and Lutheran Hour Ministries - <b>\$7,786.27</b> each;	
	<b>Conf. Screen</b>	Colton Steele (minor) and Vijay Stevens (minor) - <b>\$15,273.87</b> each <b>to be placed in to blocked accounts</b>	
<input checked="" type="checkbox"/>	<b>Letters</b>	9/28/11	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b> <b>Reviewed on: 10/2/12</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 8 - Arant</b>



Atty Campbell, Robert N (for Petitioner Janice Potter)

Atty Gilmore, David M. (for Edward D. Reimer and Ola Mae Langley)

**Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate  
Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate  
Code Section 16061.9**

			<b>JANICE POTTER</b> is Petitioner.	<b>NEEDS/PROBLEMS/ COMMENTS:</b>  1. Need Order.
			<b>Petitioner states</b> she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
			Betty Ruth Cozby died in April 2011.	
<b>Cont. from 022912, 040412, 060412, 081312</b>			Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
	<b>Aff.Sub.Wit.</b>		Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
✓	<b>Verified</b>		Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.	
	<b>Inventory</b>		Probate Code §16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.	
	<b>PTC</b>		<b>Wherefore, Petitioner seeks relief as follows:</b>	
	<b>Not.Cred.</b>		1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any;	
✓	<b>Notice of Hrg</b>		2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;	
✓	<b>Aff.Mail</b>	W/	3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.	
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>	X		
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
<b>Statement of Assets Held in The Betty Cozby Living Trust filed by Edward D. Reimer and Ola May Langley on 6/4/12.</b>				<b>Reviewed by: KT</b> <b>Reviewed on: 10/2/12</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 9A - Cozby</b>

**9B Betty Ruth Cozby Revocable (Trust)**  
**Atty Campbell, Robert N (for Petitioner Janice Potter)**  
**Atty Gilmore, David M. (for Edward D. Reimer and Ola Mae Langley)**

**Case No. 12CEPR00087**

**Status Re: Accounting**

		<p><b>JANICE POTTER</b> filed a Petition to Compel Turnover of the Betty Ruth Cozby Trust and for Damages and Attorney's Fees. The matter was heard on 4/4/12 and continued to 6/4/12.</p> <p>At the hearing on 6/4/12 the court set this status hearing for the filing of the accounting.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 8/13/12. Minute order states Mr. Gilmore advises the court that he has been having a difficult time getting the information needed to do the accounting and he just received the last of it on 8/2/12. He further advises that he still needs to complete the appraisal on the jewelry. Mr. Gilmore requests a continuance. The Court orders that there be no sale or transfer of jewelry or assets pending further order of the Court. Mr. Gilmore is directed to provide Mr. Campbell and the appropriate parties a copy of the accounting by 9/12/12.</p> <p>1. Need Accounting.</p>	
<b>Cont. from 081312</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by: KT</b>				
<b>Reviewed on: 10/2/12</b>				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 9B – Cozby</b>				

**9B**

## Petition for Payment of Attorney's Fees [Prob. C. 1470 et seq.]

		<p><b>JENNIFER L. WALTERS</b>, Petitioner, was court appointed to represent the Conservatee on 5-3-12.</p> <p>The Fresno County Public Guardian was appointed Probate Conservator of the Person and Estate on 6-6-12.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee for the petition to appoint a conservator.</p> <p>Petitioner asks that she be paid \$1,567.00 for 6.7 hours including review of documents, court appearances, meetings with client and family, and preparation of this petition.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §§1470, 1460 on:</p> <ul style="list-style-type: none"> <li>- Public Guardian (Conservator)</li> <li>- Betty Jean Steinhauer (Conservatee)</li> </ul>

<b>DOD: 6-25-11</b>			<b>MARIA GONZALEZ</b> , Surviving Spouse, is Petitioner.  No other proceedings.  Will dated 4-1-11 devises decedent's real property in Selma to Petitioner.  Petitioner requests Court confirmation that decedent's real property in Selma passes to her.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Aff.Sub.Wit.</b>	X		
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		<b>ANNETTE COSTA</b> , Daughter, filed an <b>Objection on 10-3-12.</b>  <b>Objector states</b> the property that is the subject of the petition was the separate property of Decedent. Objector objects to the will and claims that the will is not valid in that Objector does not believe Decedent executed the will or that if Decedent did execute the will that he did not have capacity to do so, or did so under undue influence.  Objector states Decedent was married to the petitioner only a short time prior to his death. The property is the separate property of Decedent and should be distributed to Petitioner and Decedent's children. Decedent was sick and heavily medicated at the time the alleged will was executed. Decedent would not have disinherited his children. Decedent did not have testamentary capacity at the time the alleged will was executed.  <b>Objector prays that the petition be dismissed without prejudice.</b>	
✓	<b>Aff.Mail</b>	w		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
✓	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

**Petition for Probate of Will and for Letters Testamentary; Authorization to  
Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 4-10-12</b>		<b>MARIA G. RESENDES</b> , Sister and Named Executor without bond, is Petitioner.  Full IAEA – ok  Will dated 2-12-98 Holographic "Addendum" dated 12-4-03  Residence: Fresno Publication: Fresno Business Journal  <b>Estimated Value of the Estate:</b> Personal Property:       \$ 20,000.00 Real Property:           \$ 150,000.00 Total:                       \$ 170,000.00  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court will set status hearings as follows. If the appropriate items are filed prior to the hearing date, the hearing may come off calendar.  <ul style="list-style-type: none"> <li>Friday 2-15-12 for filing of the Inventory and Appraisal</li> <li>Friday 2-14-13 for filing of the first account or petition for final distribution.</li> </ul>
✓	Aff.Sub.Wit., ✓ Proof of Holographic Instrument		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w		
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 10-2-12
<b>Updates:</b>
<b>Recommendation:</b> SUBMITTED
<b>File 12 - Fields</b>

## Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 3-24-12</b>			<b>GLEN GOTO</b> , son and Trustee of the Mihoko Goto Living Trust, is Petitioner.  40 days since DOD  No other proceedings  I&A: \$30,000.00  Will dated 9-23-94 devises all property to the trustee of the Mihoko Goto Living Trust.  Petitioner requests court confirmation that Decedent's 100% interest in certain real property passes to Petitioner as Trustee.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need declaration pursuant to Local Rule 7.12.5.</b>
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	W		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 10-2-12	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 13 - Goto</b>	

<b>DOD: 10-10-08</b>		<b>SHERRY MEALER</b> , Daughter and Administrator with full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 081612</b>		Accounting is waived.	<u>Continued from 8-16-12.</u>
	<b>Aff.Sub.Wit.</b>	I&A: \$81,732.32	<p><b>Minute Order 8-16-12:</b> Stacey Mealer advises the Court that Sherry Mealer directed her to appear in court today. She further advises that she's been living in the residence and paying all the upkeep and taxes. The Court is informed that Sherry Mealer has been living in Texas since 1997. Examiner notes are provide to Stacey Mealer at which time she is advised that the defects listed need to be cured. Continued to 10/4/12.</p> <p><u>As of 10-1-12, nothing further has been filed. The following issues remain:</u></p> <ol style="list-style-type: none"> <li>1. Petitioner does not state whether notice of administration was given to the Franchise Tax Board pursuant to Probate Code §9202(c).</li> <li>2. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing on Dowling Aaron, Incorporated pursuant to Request for Special Notice filed 1-31-11 (Probate Code §1252).</li> <li>3. Petitioner was previously represented by Dowling Aaron Incorporated (formerly DAK). On 6-21-12, the Court approved fees to the law firm in the amount of \$4,205.03. Need proof of payment prior to distribution.</li> <li>4. Petitioner states Property On Hand (POH) includes the same assets, including the same amount of cash, as was listed on the I&amp;A as of the decedent's date of death (10-10-08). Need statement of <u>actual</u> property on hand at this time pursuant to Cal. Rules of Court 7.550.</li> </ol> <p>(Examiner notes that Administrator was appointed almost four years ago on 12-9-08. One creditor's claim was paid, attorney fees were granted, and the house probably required upkeep. It is unlikely that the POH is the same as originally inventoried.)</p> <ol style="list-style-type: none"> <li>5. Petitioner lists the value of the residence at a different amount than previously inventoried. The value is a carry value and should remain the same.</li> </ol>
✓	<b>Verified</b>	POH: \$45,732.32 (\$5,732.32 cash plus real property, misc. shop equipment, household furniture)	
✓	<b>Inventory</b>		
✓	<b>PTC</b>		
✓	<b>Not.Cred.</b>	Administrator: Waived	
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	Distribution pursuant to intestate succession: w/o	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>	Sherry Mealer: Entire estate	
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>	X	

Age: 17		<b>NO TEMPORARY REQUESTED</b>  <b>JAMES H. EWERS</b> , Paternal Grandfather, is Petitioner.  Father: <b>MICHAEL EWERS</b> - Deceased  Mother: <b>DAGMAR MCCULLER</b> - Nomination, Consent and Waiver of Notice filed 8-1-12 - Personally served 8-2-12  Paternal Grandmother: Sandra Ewers - Served by mail 9-27-12  Maternal Grandfather: Frank Mec - Deceased  Maternal Grandmother: Georgine Mec - Served by mail 9-27-12  Sibling: Michael Ewers, Jr. (age not listed) - Served by mail 9-27-12  <b>Petitioner states</b> Michelle's father died 6-18-12 while she was living with him. Petitioner feels it would be in Michelle's best interest to continue high school here in Fresno. Her mother lives in Arizona. Petitioner lives in a senior mobile home park that will allow Michelle to live there if there is a legal guardianship. The mother consents.  <b>Court Investigator Dina Calvillo filed a report on 9-25-12.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: skc
Reviewed on: 10-2-12
Updates:
Recommendation:
File 15 - Ewers



## Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 3 months		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

TEMPORARY GRANTED EX PARTE EXPIRES 10-4-12	
SHELBY ROSE MORGAN, Maternal Aunt, is Petitioner.	
Father:	ZEPHLIN HENSON - Personally served 9-27-12
Mother:	JACQUELINE WELCH
Paternal Grandfather:	Unknown
Paternal Grandmother:	Trina Henson
Maternal Grandfather:	Eddie Welch
Maternal Grandmother:	Shirley Helm
Sibling:	Sydney French (age not listed)
Petitioner states both parents are in prison and the child is living with Petitioner. When mother is released, she will be going into a drug program (hopefully) and has no residence. Petitioner needs temporary guardianship because Zaiden needs medical attention. Declaration describes medical issues and previous home situation.	

NEEDS/PROBLEMS/COMMENTS:	
1. Need proof of personal service of Notice of Hearing with a copy of the Temporary Petition at least five (5) court days prior to the hearing pursuant to Probate Code §2250(e) or consent and waiver of notice on:  - Jacqueline Welch (mother)  <u>Note:</u> Petitioner states both parents are incarcerated at Bob Wiley Detention Facility in Tulare County.	
Reviewed by: skc	
Reviewed on: 10-2-12	
Updates:	
Recommendation:	
File 16 - Hensen	

Pro Per Gonzalez, Sr., Adam (Pro Per Petitioner, paternal grandfather)  
 Pro Per Gonzalez, Leticia (Pro Per Petitioner, paternal grandmother)

## Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 1 year		<p style="text-align: center;"><u>General Hearing set for 11/27/2012</u></p> <p><b>ADAM GONZALEZ, SR., and LETICIA GONZALEZ,</b>          paternal grandparents, are Petitioners.</p> <p>Father: <b>ADAM GONZALEZ, JR.;</b> <i>consents and waives notice.</i></p> <p>Mother: <b>ILA SUZANNE HERNANDEZ;</b> <i>personally served 9/26/2012.</i></p> <p>Maternal grandfather: Angel Mejia          Maternal grandmother: Rosa Angela Mejia</p> <p><b>Petitioners state</b> the child needs temporary guardianship because her mother and father are not complying with the programs that their CPS case worker suggested (drug, parenting, anger management). Petitioners state the CPS case worker requested a family member move forward and get guardianship of the child. Petitioners state the child is currently with her mother, who continues to use drugs, and they are concerned for the child's well-being. Petitioners state when they dropped the child off to her mother on Sunday night at 7:00 p.m., the mother had other individuals in her apartment who are known drug users, and the apartment, which is a hang-out spot for partying, was full of cigarette smoke.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
	Aff. Posting		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
✓	Letters		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LEG Reviewed on: 10/2/12 Updates: Recommendation: File 17 – Gonzalez	

18 Kristalina Arganda, Carlos Arganda, Jaedon Arganda and Nicholas Arganda  
(GUARD/P) Case No. 12CEPR00849

Atty Arganda, Carlos (pro per – paternal grandfather/Petitioner)  
Atty Arganda, Esmeralda (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

Kristalina, 11	<p align="center"><b><u>GENERAL HEARING 11/27/12</u></b></p> <p><b>CARLOS ARGANDA</b> and <b>ESMERALDA ARGANDA</b>, paternal grandparents, are Petitioners.</p> <p>Father: <b>CARLOS ARGANDA, JR.</b></p> <p>Mother: <b>VIRGINIA ARGANDA</b></p> <p>Maternal grandfather: NOT LISTED Maternal grandmother: ANNA GULIAN</p> <p><b>Petitioners allege:</b> The parents cannot provide a stable home for the children.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <b>Notice of Hearing</b>.</li> <li>2. Need proof of personal service at least 5 court days before the hearing of <b>Notice of Hearing</b> with a copy of the <b>Petition for Appointment of Temporary Guardian of the Person</b> <u>or</u> Consent &amp; Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Carlos Arganda, Jr. (father) - Virginia Arganda (mother)</li> </ol>	
Carlos, 10			
Jaedon, 7			
Nicholas, 6			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			x
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			x
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCC/JEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 10/02/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 18 - Arganda</b></p>			

Cont. from 092712		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
✓	Objections	
	Video Receipt	X
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
✓	Citation	
	FTB Notice	

NEEDS/PROBLEMS/COMMENTS:

OFF CALENDAR
Petition dismissed 10-1-12 at request of counsel for Petitioner.

Reviewed by: skc
Reviewed on: 10-1-12
Updates:
Recommendation:
File 19 - Eller